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Foreign CROPS AND MARKETS

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FOREIGN CROPS AND MARKETS

Published weekly to assist the foreign marketing of U. S. farm products by keeping the nation's agricultural interests informed of current crop and livestock developments abroad, foreign trends in production, prices, supplies and consumption of farm products, and other factors affecting world agricultural trade. Circulation is free to persons in the U. S. needing the information it contains.

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HONDURAN BANANA
EXPORTS DOWN

Banana exports from the Republic of Honduras, one of the world's leading exporters of bananas, have been sharply reduced since the disastrous flood which devastated the Ulua river valley in Northern Honduras in late September and early October 1954. Exports are currently only about one-third of normal and are expected to continue at this depressed level until the last months of 1955 when new plantings are expected to begin bearing and some rise in exports should take place. Exports in 1953, considered "normal", totalled 12.4 million stems.

SPAIN REFUSES EXPORT PERMITS FOR
CANNED RIPE OLIVES TO U.S.

The canning of ripe olives in Spain is negligible. Last fall, commercial processors considered exporting canned ripe olives to the United States and Canada. Since there appeared to be a possibility that canned ripe olives might result in pressure for regulations contrary to the best interests of the important Spanish-United States trade in pickled olives, the Spanish Government declined all applications for permits to ship ripe olives to the North American markets.

The few samples of Spanish canned ripe olives received in the United States have not been competitive with the California product on the basis of either quality or price.

**TURKISH DRIED
FIG STANDARDS**

At a meeting of representatives of the fig industry held at Aydin, Turkey at the end of January, it was voted that the Turkish Government should continue to work on the possibility of introducing standardization in the grading of figs for export.

This proposal was adopted despite considerable objection voiced by private packers and exporters. The conference was attended by representatives of government agencies and institutions, chambers of commerce, the Izmir and Aydin Fig Cooperatives, Izmir Dried Fruit Exporters, Izmir Bourse, Izmir Fig Brokers Union, and by private growers and private fig packers. The Government, its agencies and the growers supported the proposal. The conference was devoted to discussion of the growing, marketing and export of figs.

**SERIOUS IRAQI SURPLUS
OF DRIED DATES**

Reports from Iraq indicate a near-record surplus of between 51,000 and 55,000 short tons of Basra dates for which no markets are in sight. This is proving a source of considerable concern in the Basra area. The Iraq Dates Trading Company, monopoly buyer of Basra dates is anticipating serious financial difficulties owing to the unusually heavy over-supply. The Company has appealed to the Baghdad Government for financial assistance.

**WHEAT SUPPLY AND DISTRIBUTION,
CANADA, AUSTRALIA AND ARGENTINA**

Supplies of wheat continue large in the principal exporting countries of the world, despite a net decline of about a half-billion bushels in the 1954 production for the 4 principal exporters. The reduction was greatest in Canada, substantial in the United States and moderate in Australia; in Australia the decline about offset an increase in Argentina.

While wheat supplies are at an all-time record in the United States, supplies for the current season in the other 3 principal exporters are sharply above average, as will be seen in the following tables showing supply and distribution of wheat in these countries. These tables bring to attention patterns and changes in the distribution of wheat in the 3 principal competitors of the United States from 1940 to date.

Supplies in Canada on August 1, the beginning of the crop year in that country, though below the high level of the past 2 seasons, were about a third larger than the average of the 10 years ended 1949. The increase was the result of a large carry-over, with the production the smallest since 1943. It may be noted that the supply situation of that year approximated the supply for the current season, with a slightly larger carry-over than this year and smaller production.

CANADA: Wheat supply and disposition, year beginning August 1,
1940 - 1954

Crop year beginning	Supply			Disposition		
	Beginning stocks	Production	Total supply	To	Exports 2/	Domestic
			1/	United States	Total	Carry-over stocks
	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels
1940.....	301	540	841	3	231	130
1941.....	480	315	795	4	226	145
1942.....	424	557	981	1	215	171
1943.....	595	284	879	135	344	178
1944.....	357	417	774	30	343	173
1945.....	258	319	577	2	340	164
1946.....	74	414	488	4/	243	159
1947.....	86	342	429	4/	195	155
1948.....	78	386	464	1	232	129
1949.....	103	371	474	2	225	137
10-year av.:	276	395	670	18	260	153
1950.....	112	462	574	12	241	144
1951.....	189	553	742	31	356	169
1952.....	217	688	905	21	386	150
1953.....	369	614	984	5	255	146
1954 5/....	583	299	882			583

1/ Includes small quantities of imported wheat and flour. 2/ Wheat including flour. 3/ For U.S. domestic use only; i.e. U.S. imports of Canadian wheat for milling in-bond are excluded. 4/ Less than 500 thousand bushels. 5/ Preliminary.

From official sources.

Australian supplies at the beginning of the current season, December 1, 1954, were about 10 percent above the supply for the preceding year, despite a somewhat smaller production. The supply, estimated at 261 million bushels, is the largest since 1943, when large stocks offset a comparatively small crop. Reduced exports last year, this country's smallest since 1946, are reflected in the increased carry-over, which was the largest since 1942.

Australia: Wheat supply and disposition, year beginning December 1, 1940 - 1954

Year Beginning December 1	Beginning stocks : Million bushels	Production : Million bushels	Total supply : Million bushels	Exports : Million bushels	Domestic use : Million bushels	Carry-over stocks : Million bushels
1940.....	77	82	159	57	60	42
1941.....	42	167	209	44	61	104
1942.....	104	156	260	37	69	154
1943.....	154	110	264	90	96	78
1944.....	78	53	131	19	101	11
.....
1945.....	11	142	153	56	77	20
1946.....	20	117	137	45	78	14
1947.....	13	220	233	131	76	26
1948.....	26	191	217	120	78	19
1949.....	19	218	237	121	72	44
.....
10-year av.	54	146	200	72	77	51
.....
1950.....	44	184	228	129	80	19
1951.....	19	160	179	81	81	17
1952.....	17	195	212	102	72	38
1953.....	38	198	236	64	78	94
1954 <u>1/</u>	94	167	261
.....

1/ Preliminary.

From official sources.

The December 1, 1954 wheat supply in Argentina was the largest since 1944. The harvest completed in January was larger than last year's harvest, more than offsetting some indicated reduction in carry-over stocks. The smaller carry-over is attributed to the high level of exports for the season ended December 1, 1954. Exports of 112 million bushels, reported for the season, are the largest since the exports of the 1939-40 season.

Argentina: Wheat supply and disposition, year beginning
 December 1, 1940 - 1954

Year Beginning December 1	Beginning stocks	Production	Total supply	Exports	Domestic use	Carry-over stocks
	: Million bushels					
1940.....	20	299	319	87	103	129
1941.....	129	238	367	79	120	168
1942.....	168	235	403	72	123	208
1943.....	208	250	458	86	177	195
1944.....	195	150	345	90	165	90
1945.....	90	144	234	51	138	45
1946.....	45	206	251	81	130	40
1947.....	40	239	279	81	128	70
1948.....	70	191	261	68	138	55
1949.....	55	189	244	101	128	15
10-year av.	102	214	316	80	135	102
1950.....	15	213	228	94	114	20
1951.....	20	77	97	4	88	5
1952.....	5	281	286	82	138	72
1953.....	72	228	300	112	130	60
1954 1/.....	60	275	335

1/ Preliminary.

From official and unofficial sources.

RAMIE SPINNING MILL
TO BE ERECTED IN MEDAN

A ramie spinning mill with a capacity of 5,000 spindles is definitely planned for construction in Medan, according to an Industry Department announcement reported by Foreign Service Officers in Sumatra, Indonesia. The machinery is to be supplied by Japan.

The Acting Chief of the Indonesian Institute for Textile Research stated that the textile industry in Java uses complete equipment, but the Sumatran industry uses only light machinery. He considers it necessary for manufacturers in Sumatra to procure more machinery, expand their enterprises, and eventually increase production.

**VENEZUELAN SISAL
SURPLUS CONTINUES**

Venezuelan sisal producers have asked again for assistance, according to a report from James M. Kempton Agricultural Attaché, American Embassy, Caracas. The producers have been hard hit by the sharp decline in fiber prices just as their relatively large expansion in sisal acreage came into production. The Venezuelan government has been hesitant to assume responsibility for the industry.

Sisal production in Venezuela averaged considerably less than a half-million pounds annually before the war, but large new plantings which reached the harvest stage by 1951 resulted in production so large in the past 4 years that an annual surplus of 10 million pounds or more has been built up in the country. The acreage was expanded in the years of generally good demand and very favorable prices during the war and early postwar period.

Production increased from 6.5 million pounds in 1950 to 17.6 million in 1951 and about 19.8 million pounds in 1952 and again in 1953. The 1954 crop probably was somewhat smaller but still much in excess of demand.

Unfortunately for the growers, the peak prices of 1951, the year of their first large harvest, broke in the early months of 1952. The decline was sharp throughout the succeeding months of 1952, and world sisal prices have continued since in a downward trend. Thus the increasing production was meeting declining prices on the world market and stiffer competition from more selective buyers as world supply became more plentiful.

Sisal prices in Venezuela are reported to have declined from the equivalent of 20.4 U.S. cents a pound in 1951-52 to a current price of about 6.8 cents.

Growers in presenting their plea for assistance suggested several possible actions, as follows:

- (a) protect local products made of sisal by prohibiting importation of competitive articles,
- (b) include sisal as an export product in all trade negotiations,
- (c) create a government agency to handle exports of sisal, thus eliminating middlemen,
- (d) study the experience of other sisal producing countries,
- (e) control the prices of articles made of sisal in accordance with the prices paid to sisal producers - a kilo of rope made of sisal at Bs. 0.50 retails at Bs. 2.30 - or an increase of 360 percent,

(f) install universally standard machines for decortication.

It is reported that one of the largest cordage mills in Venezuela is planning to begin the manufacture of sisal sacks. Four machines are being installed for the work, and they will have a combined capacity of 12,000 sacks a day. They are expected to be grain and onion sacks. This venture is expected to be some help in utilizing domestic sisal fiber.

MEXICAN SUGAR SALES

The National Union of Sugar Producers announced two important sales which will help reduce the sugar surplus in Mexico: (1) 21 thousand short tons raw value to the U. S.S.R. negotiated through International Sugar Conference in London; (2) 21 thousand tons to Canada under a barter deal through the Banco Nacional de Comercio Exterior in exchange for 90 thousand cases of whiskey.

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PUBLICATIONS RELATING TO U.S. FOREIGN AGRICULTURAL TRADE

Issued recently and available free upon request from the Foreign Agricultural Service, U.S. Department of Agriculture, Washington 25, D. C.

Foreign Agricultural Trade Digest, for March, 1955.

Foreign Agricultural Trade of the U.S.,--Statistical Report, for November, 1954.

Denmark Announces a Partial Liberalization of Dollar Imports.
Foreign Agriculture Circular FATP 4-55

Exports of Unmanufactured Tobacco Lower in 1954. Foreign Agriculture Circular FT 10-55.

The Vegetable Oils and Oilseed Situation in French Equatorial Africa. Foreign Agriculture Circular FFO 5-55.

World Castor Bean Production Approximates 1953 Harvest. Foreign Agriculture Circular 4-55.

(Continued on Page 401)

DAIRY PRODUCTION INCREASES IN SPAIN

Production of milk in Spain during 1954 amounted to 5.9 billion pounds, an increase of about 13 percent over 1953. Production per capita is just over 200 pounds, but since about 21 percent of production is fed to animals the amount available for human consumption drops to slightly more than 160 pounds per person.

Of the total production, 987 million pounds of milk were from sheep and goats. Production of sheep's cheese totaled more than 45 million pounds while goat's cheese produced amounted to 6.7 million pounds. Production of cow's milk cheese totaled 27.4 million pounds during the year while butter production was just under 13 million pounds.

Spain reported commercial dairy imports of cheese only during 1954, taking slightly more than a million pounds of cheese from the Netherlands. Most of the dairy imports were in the form of surplus dairy products from the United States for relief distribution. Since July, 1954 Spain reports receipts of 17 million pounds of nonfat dry milk solids, 12.7 million pounds of cheese and 11.6 million pounds of butter from surplus United States stocks. Spanish dairy interests first expressed considerable opposition to the relief distribution of these commodities, but now agree that the distribution of milk and dairy products to needy persons does not work to the detriment of the local dairy industry, but actually helps to create a greater demand for such items.

CHESHIRE CHEESE REPLACES CHEDDAR IN BRITISH MANUFACTURE

The Farmers' Weekly reports that Cheshire cheese has replaced Cheddar cheese as the principal product of Britain's cheese factories. The Weekly states that during 1954 Cheshire cheese production took almost 50 percent of all manufacturing milk going to cheese making; Cheddar cheese took just under 37 percent of the milk.

The remainder of the milk for cheese making went to the manufacture of speciality-type cheeses which are not as yet widely distributed. If the demand for them catches on the Weekly believes that it will result in a more fluid price structure and might eventually result in the abandonment of the rather complicated price formula which is based on the price of New Zealand cheese.

The price of New Zealand cheese on the United Kingdom market has been declining in order to clear stocks before the rush of the new season's imports begins. Foreign Crops and Markets of March 28, 1955 reported New Zealand Cheddar cheese at 18.9 cents a pound, down 1.1 cents from the previous month. The trade is finding it increasingly difficult to compete with imported Cheddar and milk for Cheddar manufacture is bringing only \$1.60 a hundredweight while bringing up to \$2.17 for other cheese manufacture.

BRITAIN REVIVES "MILK IN INDUSTRY" PLAN

The National Milk Publicity Council, in which the Milk Marketing Board is represented, has announced the revival this month of the "Milk in Industry" campaign, a plan designed to promote the buying and drinking of milk on the job.

The plan was originated back in 1936, but ended with the advent of wartime rationing. When it was discontinued in 1939 more than 2 million persons in about 7,000 firms were consuming at work more than 100 million pounds of milk. The new campaign hopes to raise these figures considerably and is aiming at a consumption of 185 million pounds annually. To foster participation the Council is using United States studies made on worker health and output in Connecticut and New Jersey industrial plants when morning and afternoon "milk breaks" are introduced.

URUGUAY MILK PRODUCTION SLIGHTLY DOWN

Milk production in Uruguay in 1954 was more than 1.2 billion pounds, a slight drop of about 2 percent from the 1953 high. The drop was attributed to (1) a dry spring and early summer and (2) milk prices compared to higher cost of production.

Milk prices are partially controlled by the Milk Commission. In 1954, the official price for "quota" milk in the Montevideo market was 24 centisimos a liter or, at the prevailing rate of exchange, about \$3.30 a cwt. Surplus milk had a 7-centisimo price per liter, about 96 cents a cwt. Since about one-third of the milk in Uruguay falls in the surplus class the average price for milk was about \$2.52 a hundredweight.

Uruguay is in the world market in dairy products in only a small way, both as an importer and exporter. Exports of casein only were recorded in 1954; these amounted to about 1.5 million pounds, most of which was directed to the United States. While Uruguay exported 660,000 pounds of butter to Soviet Russia in 1953, no exports were made in 1954. About 11,500 pounds of cheese were imported in 1954, most of it speciality varieties from European sources. Uruguay imported 146,000 pounds of powdered milk, about 11,000 of which was dry whole milk from the United States. Of the 70,000 pounds of dietetic dairy foods imported, 38,500 was of United States origin.

Uruguay has also apparently lost its dairy cattle market in Brazil.

The National Milk Producers Cooperative, and also the largest milk distributor in the country, has under consideration a drying plant which would produce about 2 million pounds of nonfat dry milk solids for animal feed.

MILK PRODUCTION RISES IN ISRAEL

Production of milk in Israel during 1954 was 12 percent greater than during 1953; cow's milk production amounted to approximately 340 million pounds while the milk production of other animals, primarily sheep, totaled an estimated 68 million pounds. The number of animals increased about 3 percent during the year so the increased production was due in large part to increased output per animal.

Demand for fluid milk, however, did not keep pace with the increase in production and farmers experienced difficulty in marketing their output, particularly during the spring months. In order to assist in the disposition of surplus milk, the Government authorized the production and sale of both sweet and sour cream with a high fat content. Furthermore, the subsidization of fluid milk, which had been discontinued in April, was reinstated and the practice of extending fluid milk by the admixture of imported powdered milk, previously practiced during the August to February period, was discontinued during the last part of the year.

Milk production during the first part of 1955 is above 1954 output and, given a normal year in weather, Israel production may increase another 10 percent. The plans to settle large tracts of hilly land in the Lakhish area may result in a further increase in sheep's milk production by 20 percent.

DAIRY DEVELOPMENTS IN INDIA

The Government of West Bengal has just opened 6 new retail milk depots in Calcutta. This brings to 75 the number of milk depots now operating in Calcutta and Howrah.

The retail price of cow's milk is quoted at 9.2 cents per pound (approximately 20 cents per quart) in half pound, one pound and two-pound bottles. The price of toned milk is given as 7.2 cents per pound; toned milk is usually high-fat content buffalo milk which has been standardized by the addition of nonfat dry milk solids. Customers for milk must register their requirements by filling in registration forms at the depots and must deposit from 5.2 cents for a half-pound bottle to 10.5 cents for a two-pound bottle.

Butter and ghee are also sold at the depots; pasteurized butter sells at 73.5 cents a pound and ghee retails at 68.25 cents per pound.

At Bombay verification was given of the assistance of the United Nations Children's Fund in the erection of a \$250,000 dry milk plant at Anand, the cattle center near Bombay. The plant will produce spray-type nonfat dry milk solids for distribution under the various milk-for-children programs approved by UNICEF and the Government of India.

EXPORTS OF MEAT FROM ARGENTINA TO CONTINUE SMALL

Exports of beef from Argentina this year are expected to be relatively small in relation to production, unless the Government further restricts domestic consumption, according to William Rodman, Assistant Agricultural Attaché, American Embassy, Buenos Aires. However, cattle slaughter this year may be above 1954.

During the past two years meat production in Argentina has been at, or above, prewar levels but greatly reduced exports compared with prewar have been the result of increased local demand.

Argentina exported slightly over 220 million pounds of chilled and frozen beef in 1954, of which nearly 181 million pounds were shipped to the United Kingdom. Exports of beef offal totaled approximately 41 million pounds, most of which went to the United Kingdom. There remained on, February 1, a beef balance to the United Kingdom of about 62 million pounds. The trade expects to ship nearly 35 million by the end of March and the remainder may not be completely shipped until May or June.

Within a year Argentina will be sending 90 percent of its beef to Britain in chilled instead of frozen form, the Argentine Minister of Agriculture stated on a recent trip to the United Kingdom to study meat marketing there and ways of increasing agricultural production. The emphasis on chilled beef reflects the weak demand for frozen meat in the United Kingdom.

Cattle slaughter in 1954 was estimated at around 8.3 million head, slightly greater than in 1953 but was below the 1950-52 average of 8.7 million head. In an effort to assure a more even seasonal flow of cattle to market, the Government has announced a price-bonus plan for steers marketed in the winter months.

Sheep slaughter during 1954 is estimated at about 6.5 million head and is believed to be the largest for several years. This gain reflects large marketings of aged ewes and wethers to fill overseas orders rather than an upward trend in production. Slaughter in 1955 is expected to decline. Mutton and lamb exports last year totaled nearly 114 million pounds, of which Britain received about 68 million and the remainder was shipped mostly to the Soviet Union. It is reported that the U.S.S.R. is now negotiating for a new contract for ewe and aged wether carcasses but the amounts involved have not been disclosed.

Hog numbers in 1954 dropped to a very low level and exportations of pork sides have been prohibited since August because of the short domestic supplies. Some increase in the hog population is expected this year, but it is doubtful if the increase will be large, because of Argentina's short corn crop. Export permits for pork products amounting to 4 million pounds have been issued. Pending completion of contracts of that amount, the trade expects practically no exports of pork during at least the first half of 1955. Argentina's exports of pork and offal in 1954 totaled nearly 39 million pounds. Of this amount, nearly three-quarters was shipped to the U.S.S.R. and other Iron Curtain countries and most of the remainder to the United Kingdom.

EGG PRODUCTION IN 1954 AND CURRENT CHICKEN NUMBERS IN SPECIFIED COUNTRIES

Egg production in the reporting countries of the world continued its upward trend in 1954 for the third straight year. Again as in 1953 North America and Europe were the principal world suppliers of eggs.

The Netherlands, Denmark, Ireland, Canada and the United States were large exporters of eggs. Present indications point to an expanded output in 1955 by various European countries but total production for the reporting countries should be about the same as 1954. The egg-feed price relationship in Europe is expected to be quite favorable during 1955.

Total chicken numbers in the major producing countries in 1954 changed slightly. However, chicken numbers expanded significantly in Denmark, Netherlands, Western Germany, Canada and the United States. Noted reductions, partly because of the uncertainty of the United Kingdom market occurred in Ireland, Australia, the Union of South Africa and the United Kingdom itself.

The United Kingdom is the largest importer of eggs in the world and decontrol of its egg trade in March 1953 affected its suppliers in 1954. On January 1, 1954 United Kingdom contracts for eggs and poultry products with countries in the sterling area were terminated.

Egg production in Ireland, Union of South Africa and Australia was reduced but exporters still faced uncertainty because of the lack of a steady export market. Thus flock-size readjustments took place. Denmark and the Netherlands on the other hand expanded their production. Also Denmark in 1954 renegotiated an egg-delivery agreement with the United Kingdom.

Egg production in Denmark continued to rise in 1954 in spite of a poor 1953 grain harvest. During calendar year 1954 Denmark imported a total of 1,023,574 tons of breadgrains and feedgrains to meet its human consumption and livestock feeding programs. In addition in 1954 it imported 706,660 tons of feedstuffs, primarily oilseed cake.

(See tables on immediately following pages)

EGGS: Number produced 1/ in specified countries, averages
1934-38, 1946-50; annual 1952-54

Continent and Country	Average 1934-38	Average 1946-50	1952	1953	1954	
	Million	Million	Million	Million	Million	
<u>NORTH AMERICA:</u>						
Canada- Farm	2,638	4,015	3,984	4,086	4,420	
Canada - Total	2,863	4,382	4,104	4,200	4,547	
Mexico		--	--	2,080	2,400	
United States - Farm	35,498	56,535	60,985	61,704	64,260	
<u>EUROPE:</u>						
Austria	663	369	785	845	845	
Belgium	1,693	1,584	2,030	2,175	2,325	
Denmark	1,979	1,447	1,968	2,155	2,357	
France	6,200	6,580	7,000	7,000	7,200	
Germany, Western	3,700	2,655	5,300	5,500	6,000	
Greece	550	388	490	525	550	
Ireland	1,086	893	972	980	840	
Italy	5,500	4,380	5,550	5,600	5,850	
Netherlands	1,978	1,189	2,570	3,130	3,750	
Norway	369	283	392	420	437	
Sweden	1,000	1,288	1,370	1,375	1,380	
Switzerland	423	486	518	520	536	
United Kingdom-Farm <u>2/</u> <u>3/</u>	3,871	2,880	4,700	4,600	4,650	
United Kingdom-Total <u>2/</u> <u>3/</u>	5,098	4,590	6,300	6,200	6,250	
<u>OTHER COUNTRIES:</u>						
Turkey	1,003	859	980	--	1,000	
Japan	3,553	970	4,676	5,140	5,340	
Philippine Islands <u>4/</u>	738	567	950	1,015	1,050	
Argentina	1,127	--	3,000	3,150	3,500	
Brazil	--	--	3,730	3,800	4,380	
Peru	--	--	--	--	440	
Uruguay	--	289	--	330	320	
Egypt	751	5/ 694	520	525	530	
Union of South Africa <u>6/</u>	--	--	955	970	900	
Australia <u>7/</u>	708	1,418	1,230	1,230	1,200	
New Zealand	430	8/ 146	185	190	190	

1/ Relates to farm production in the United States but many countries not explicit on this point. 2/ Years ending May. 3/ Three-year average. 4/ 1938. 5/ For 1947. 6/ Years ending June. 7/ Commercial production for years ending June 30. 8/ Receipts at Marketing Department Stations, year ending March, which account for 30-40% of total production.

CHICKENS: Numbers in specified countries, averages
1934-38, 1946-50; annual 1952-54

Continent and Country	Date	Applicable	Average 1934-38	Average 1946-50	1952	1953	1954
			Thousands	Thousands	Thousands	Thousands	Thousands
<u>NORTH AMERICA:</u>							
Canada	Dec. 1		44,077	45,245	42,717	38,500	40,000
Mexico	March	2/	36,368	--	--	--	60,000
United States	Jan. 1		408,177	465,503	449,925	429,731	442,813
<u>EUROPE:</u>							
Austria	Dec. 3	3/	8,862	5,640	8,200	8,600	8,800
Belgium	Dec. 31		16,500	14,069	15,000	15,000	--
Denmark	July	3/	27,643	22,030	23,411	24,251	25,234
Germany, Western	Dec.		51,225	--	50,676	51,344	55,234
Greece 4/	Nov. 30		11,679	8,366	10,010	11,614	12,500
Ireland	June		15,961	16,677	16,287	16,195	13,000
Netherlands	Dec.	5/	29,632	7,864	15,816	15,709	19,778
Norway	June 20		5,686	4,617	--	4,887	--
Sweden	6/		10,980	12,467	11,091	10,932	11,158
Switzerland	April	2/	5,544	5,674	6,260	6,200	6,300
United Kingdom-Farm	June		73,402	77,153	90,422	87,516	80,389
Yugoslavia	Jan.		18,000	8/ 17,330	18,340	17,225	22,400
<u>OTHER COUNTRIES:</u>							
Turkey			16,764	18,811	21,700	21,320	--
Japan	July		51,094	17,192	30,273	36,586	41,805
Philippine Islands	Dec. 31		25,365	15,766	32,090	36,444	40,000
Brazil			--	--	--	--	127,000
Peru			--	--	--	--	11,600

1/ Year end estimates (October-December) shown under following year for comparison. Thus for Canada, the December 1, 1952 estimate is shown under 1953. 2/ 1940. 3/ Average 2-4 years only. 4/ All poultry. 5/ June. 6/ Sept. 1937, June 1946-1949, April 1950-52, census estimates include layers and chicks. 7/ 1936. 8/ 1949-1950

FINLAND'S EXPORTS OF
CHEESE

Cheese production in Finland in 1954 reached a record for that country of 51 million pounds, according to Elmer A. Reese, U. S. Agricultural Attaché. This output, 5 percent above 1953, almost tripled that of prewar, and consisted largely of Emmenthal types.

Cheese continues to be Finland's principal agricultural export. Approximately one-half of total cheese production is destined for export to some thirty countries. The principal countries of destination are shown in the table below.

FINLAND: Exports of Cheese by Principal Countries
of Destination, 1953 and 1954

Destination	1953	1954
	<u>Pounds</u>	<u>Pounds</u>
Western Germany.....	7,427	105
Eastern Germany.....	1,751	10,767
Italy.....	4,251	2,016
France.....	3,189	2,236
Belgium-Luxembourg.....	1,994	2,316
Algeria.....	1,478	1,064
Czechoslovakia.....	1,231	4,159
United States.....	394	858
United Kingdom.....	360	31
Tunisia.....	318	509
Others.....	1,416	849
Total.....	23,809	24,910

NEW ZEALAND ASKED TO SHIP
LESS MEAT TO U.K.

Britain has asked the New Zealand Meat Board to slow down meat shipments during approximately the next 6 weeks because of the heavy accumulation of meat in storage in Britain, according to Eugene T. Ransom, Agricultural Attaché, American Embassy, Wellington. The Meat Board and the industry are aware of the impending crisis but no restrictive measures in slaughter or shipping have been reported or instituted since the news of the slow-down was made public.

Agriculture officials indicate that during and immediately following World War II storage was available in New Zealand for about 60 per cent of the annual slaughter. Increased output and other factors have probably reduced available storage to about 50 per cent of annual slaughter at the 1954 rate. Refrigerated spaces are not filled completely at the present time, and as the peak in slaughter has passed officials are hopeful that restrictions on slaughter will be avoided. Producers will not be hurt materially if restrictions are placed on slaughter, as fat stock have largely been marketed and most animals which are going to slaughter now are cows that can be held on farms without great loss. However, the economy of the country may suffer in the short run if shipping schedules are disarranged.

The present crisis serves to point up the overall problem in marketing New Zealand beef and lamb. The major factor in the excess supply position in the United Kingdom is one of increased production in Britain and the housewife's preference for fresh meat. New Zealand will need to reexamine its marketing pattern and make adjustments to fit into the demand pattern in Britain and seek other markets. As a first step this may call for expanded cold storage space and later for adjustments in the kinds and types of meats produced.

The Chairman and General Manager of the New Zealand Meat Board left for the United States March 20 en route to London and the Continent to make a comprehensive fact-finding study of prospective markets for New Zealand meat. In Britain they will be interested in seeing how the change-over to open market selling has affected the British farmer, as New Zealand marketing must be geared to British marketing. They indicated a trip behind the Iron Curtain might be made. Sweden has also been mentioned as a possible market.

MEXICO RESTRICTS BEEF EXPORTS AND RAISES PRICES

Higher ceiling prices for beef in the Federal District of Mexico and suspension of exports from the Tampico plant resulted from an official decree of March 7, reports Paul C. Minneman, Counselor for Agricultural Affairs, the American Embassy, Mexico City. This legislation was designed to increase the flow of meat supplies to southern urban centers and to alleviate meat shortages there.

The shortage of meat which has prevailed in the Federal District was due largely to the fact that cattlemen were dissatisfied with prevailing official prices and were withholding their cattle from market. On March 7 ceiling prices for beef at retail and wholesale were increased in the Federal District as well as in the States of Morelos, Hidalgo and Puebla. Prices for carcass beef at wholesale which were 2.75 and 3.00 pesos per kilogram (10 to 11 cents per pound) for ordinary and supreme quality, respectively, were raised to 3.25 and 3.50 pesos (12 to 13 cents per pound).

Exports of meat from the packing plant located at Tampico will be temporarily suspended by Government decree. This plant was supplying a contract for 2.2 million pounds of frozen beef to Germany, but it is reported that most of the beef had already been shipped. The unfulfilled portion of the contract either will be cancelled or will be supplied by other packing plants. In order to avoid closing the plant it will continue to slaughter for shipment to Mexico City. The suspension of exports from this plant was decided because of its relative closeness to Mexico City and because most of the cattle slaughtered there come from the Huasteca region which traditionally has supplied the Federal District. Other meat-packing plants in northern Mexico will continue exporting meat.

The operation of the Tampico plant was taken over by the Ministry of Agriculture some time ago because of its indebtedness to the National Bank of Agricultural Credit and the National Bank of Foreign Commerce, both of which are Government agencies.

U.S. BEAN EXPORTS LOW IN JANUARY

Exports of United States beans in the month of January 1955 dropped to 96,000 bags from a December 1954 figure of 180,000 bags. This drop brought the period September-January (the first 5 months of the current marketing year) to 1,000,000 bags, or 220,000 bags less than the corresponding 5 months a year ago. This is still a sizable export compared with the periods September through January of marketing seasons prior to 1951-52. That was the season when Mexico first entered the United States market to purchase large quantities of pinto beans.

The export of 10,000 bags to Mexico in January was the lowest in any month since July 1951. It compares with 16,000 bags in December 1954 and an average of almost 24,000 bags per month for the entire year of 1954.

Exports to Cuba of 47,000 bags in January were the same as in December and the total for the 5 months was second to the highest ever recorded for that period. Comparatively low domestic production, low stocks at the beginning of the season in Cuba, and a good demand there account for the sustained large flow to that market.

Exports to the Western European markets (the United Kingdom, Germany, the Netherlands and Belgium) of 20,000 bags in January, was 60 percent less than the December 1954 shipments. For the 5 months, exports were about one-half the volume of the comparable period for each of the past 3 years. Scarcity of exportable white beans, preferred in these markets, and high prices in the United States, probably account for much of this decline.

BEANS, DRY, EDIBLE: United States exports by class and country of destination,
September-January 1954-55 compared with September-January 1953-54

Country of destination	Pea beans	Great Northern	White kidney	Other	Red kidney	Pinto	Other ripe	Other	Seed beans	Total 1954-55	Total 1953-54
(B a g s o f 1 0 0 p o u n d s)											
Canada.....	14,022:	4,105:	17,740:	1,234:	84,425:	526:	1,964:	2,304:	41,895:	24,213	
Cuba.....	-:	52,895:	15,075:	16,895:	240,512:	60:	409,862:	60:	297,369		
Mexico.....	-:	-:	7,456:	36:	60,337:	11,223:	2,106:	81,158:	204,785		
Venezuela.....	218:	1,400:	3,472:	3,444:	3,019:	11,904:	497:	23,954:	15,207		
United Kingdom.....	19,456:	-:	130,935:	-:	880:	-:	129:	151,400:	277,713		
Netherlands.....	-:	-:	44,037:	-:	318:	-:	920:	45,275:	122,096		
Belgium & Luxembourg.....	5,943:	-:	5,720:	-:	-:	-:	257:	11,920:	21,851		
Germany, Western.....	-:	-:	21,309:	-:	2,415:	-:	-:	23,724:	37,169		
Greece.....	-:	-:	1,100:	-:	-:	-:	-:	1,100:	105,154		
Hungary.....	-:	-:	-:	-:	-:	-:	-:	22,044:	-		
Italy.....	-:	-:	-:	-:	-:	-:	-:	5,371:	10,000		
Haiti.....	-:	5,836:	30,145:	1,918:	26,179:	-:	800:	64,878:	-		
Colombia.....	-:	-:	100:	5,160:	5,000:	-:	-:	10,260:	-		
Israel-Palestine.....	-:	-:	6,600:	-:	-:	-:	-:	6,600:	32,968		
Lebanon.....	-:	-:	28,202:	-:	-:	-:	-:	28,202:	-		
Japan.....	-:	-:	42,194:	4,000:	-:	-:	-:	46,224:	1,125		
Philippines, Rep. of.....	-:	1,800:	1,183:	61:	-:	1,000:	2:	4,046:	3,901		
Other.....	558:	250:	7,422:	8,912:	0:	3,107:	3,176:	23,425:	67,850		
Total.....	40,197:	66,286:	363,343:	109,190:	142,331:	269,710:	10,281:	1,001:	338,1,221,401		

Source: Compiled by Foreign Agricultural Service from
Official records of the Bureau of the Census.

**GREEK-JAPANESE TRADE
AGREEMENT SIGNED**

Greece and Japan signed a trade and payments agreement in Athens on March 12, 1955, to cover commodities to the value of \$2.5 million in each direction. Greece is to export tobacco, other agricultural commodities and minerals in exchange for manufactured articles.

**CIGARETTE FACTORY TO BE
ESTABLISHED IN CAMBODIA**

It is reported that plans have been made to establish a cigarette factory in Phnom Penh, Cambodia. Present plans are to import processed tobacco from Vietnam until the company is well established.

**SMALLER RHODESIAN
FLUE-CURED CROP**

The American Consul General at Salisbury reports that a smaller flue-cured crop is expected this year, 109.7 million pounds compared with the 120.3 million pounds sold in 1954. Heavy rains earlier in the season damaged the crop to some extent and were largely responsible for the smaller crop.

Early tobacco (planted before November) comprises about 50 percent of the crop and has grown well. Later plantings were damaged and in some cases it was necessary to replant. Although there have been some reports of attacks of diseases, these have not been widespread and the late plantings are doing well, now that the rains have abated. To date, more leaves have been saved per plant than last year as additional barns have been built and the crop is ripening more slowly.

Despite the rains, a reasonably good crop is expected. The leaf will probably have less body but good color. On the first day of auction 430 thousand pounds were sold at an average price of 50.3 U. S. cents, up about 4.6 cents from last year's average.

**U. K. TOBACCO IMPORTS
LOWER IN 1954**

Imports of unmanufactured tobacco into the United Kingdom were down slightly to 312.5 million pounds in 1954, compared with 315.8 million in 1953. Shipments received from most suppliers were higher in 1954 than in 1953 but shipments from the United States decreased from 174.2 million pounds in 1953 to 159.7 million in 1954. Primarily this was caused by large quantities of U. S. tobacco that were obtained in 1952 and were not shipped until the spring of 1953. This pattern was not repeated in 1954.

United Kingdom: Imports of Unmanufactured Tobacco, 1954 with Comparisons
(Dry Weight)

Country	Average 1934-38	1951	1952	1953	1954
1,000 pounds					
Southern Rhodesia.....	15,845	50,403	58,445	57,312	62,818
India.....	17,355	40,120	38,297	31,426	36,218
Canada.....	9,834	21,639	32,439	24,063	24,860
Nyasaland.....	12,510	16,107	11,826	10,933	13,969
Other Commonwealth.....	1,531	3,121	2,434	3,186	1,625
Total Commonwealth.....	57,075	131,390	143,441	126,920	139,490
United States.....	213,017	212,005	66,840	174,161	159,667
Greece.....	563	1,273	1,170	767	1,445
Turkey.....	564	3,155	570	2,369	2,836
Netherlands 1/	1,040	3,799	9,088	9,672	6,765
Other.....	2,483	3,256	2,634	1,881	2,285
Total Foreign.....	217,667	223,488	80,302	188,850	172,998
Total all Sources.....	274,742	354,878	223,743	315,770	312,483

1/ Re-exports of Indonesian and other leaf by the Netherlands.

Compiled from Trade and Navigation of the United Kingdom and other official sources.

United States: Exports of Unmanufactured Tobacco to the United Kingdom
Quantity and Value

Type	1953		1954	
	Quantity	Value	Quantity	Value
	1,000 pounds	1,000 dollars	1,000 pounds	1,000 dollars
Flue-cured.....	177,648	125,652	147,997	108,687
Burley.....	421	282	236	173
Kentucky-Tennessee.....	298	162	420	232
Virginia Fire-cured.....	284	212	167	112
Black Fat.....	-	-	7	6
Green River.....	1,026	384	967	495
Cigar Leaf.....	15	22	17	27
Perique.....	36	41	34	42
Stems and Scrap.....	2	1	11	3
Total.....	179,730	126,756	149,856	109,827

Factory consumption of tobacco increased again in 1954. Consumption of about 290 million pounds was about 7 million pounds more than in 1953 due to larger domestic consumption, which more than offset lower exports of products especially cigarettes. Estimated clearances of unmanufactured tobacco from bond show that percentagewise, clearances of United States leaf dropped to the low of 49 percent of total clearances in 1954. This figure will probably stabilize or may even reverse in years to come as cigarette manufacturing operations moved into an area of less restriction during the first of 1955. There had been in effect some restrictions that kept the most popular cigarette brands in short supply. Now that these are removed and consumer preference will have more control of production United States tobacco may be in greater demand. The present uncertainty has manufacturers in the United Kingdom declining to make advanced commitments until some trend becomes evident. One result of this attitude was the recent decision not to extend the Rhodesian purchase agreement at the present.

United Kingdom: Estimated Clearances of Unmanufactured Tobacco from Bond as an Indication of Factory Consumption

Year	Clearances	Percentage of Total		
		United States	Commonwealth	Other
				Percent
Million pounds	Percent	Percent	Percent	Percent
1946.....	322	80	19	1
1947.....	292	79	20	1
1948.....	271	72	25	3
1949.....	271	65	31	4
1950.....	271	58	37	5
1951.....	287	54	41	5
1952.....	280	52	43	5
1953.....	283	50	46	4
1954.....	290	49	47	4

EGYPTIAN TOBACCO
MARKET in 1954

Egyptian imports of unmanufactured tobacco increased slightly in 1954 to 24.0 million pounds compared with 23.7 million in 1953. Imports from the United States increased from 5 million pounds in 1953 to 5.8 million in 1954, and this country was the largest supplier. This increase took place despite the fact that no dollars were made available at the official rate and manufacturers had to pay a 10 percent premium to obtain dollars with which to buy our leaf. United States leaf bought, consisted of about 80 percent flue-cured and 20 percent Burley, which are used to manufacture the increasingly popular Virginia and America blended types of cigarettes.

Egypt: Imports of Unmanufactured Tobacco

Country of Origin	Average	1952	1953	1954
	1946-50			
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
	:	:	:	:
Turkey.....	10,191	7,667	6,165	5,522
United States.....	3,667	4,199	4,999	5,773
Greece.....	1,901	3,604	3,081	3,497
India.....	2,048	2,177	2,173	2,120
China.....	580	984	904	1,046
U.S.S.R.	272	1,080	881	1,006
South African Countries.....	5,252	4,760	4,076	3,446
Other Countries,.....	3,009	1,930	1,402	1,588
	:	:	:	:
Total.....	26,920	26,401	23,681	23,998

The major competition for United States leaf is furnished by flue-cured tobacco imported from China, India, and Rhodesia. Leaf from other sources is mainly for the production of Oriental cigarettes. Imports of products are relatively small due to the high tariff imposed.

Virginia and American-blended types of cigarettes are slowly taking a larger proportion of the Egyptian market. Probably these types would have increased faster if manufacturers had not found it necessary to pay a 10-percent premium for dollars necessary to purchase United States tobacco.

Egypt: Percentage Breakdown of Tobacco Manufactures

Product	Average	1952	1953	1954
	1951			
	Percent	Percent	Percent	Percent
	:	:	:	:
<u>Cigarette Types</u>	:	:	:	:
Oriental.....	34.9	32.5	29.4	27.4
Virginia.....	12.0	12.2	13.7	13.0
U.S. Blended.....	25.5	26.2	28.5	29.7
	:	:	:	:
<u>Other</u>	:	:	:	:
Roll-your-own (Oriental type).....	15.6	16.2	14.8	14.8
Pipe Tobacco and small cigars.....	11.0	11.0	12.5	13.9
Chewing Tobacco.....	1.0	1.0	1.1	1.2
	:	:	:	:
Total.....	100.0	100.0	100.0	100.0

U. S. Exports of Unmanufactured Tobacco to
Egypt - Quantity and Value

Type	1953		1954	
	Quantity	Value	Quantity	Value
	1,000	1,000	1,000	1,000
	pounds	dollars	pounds	dollars
Flue-cured	4,225	2,605	4,918	2,968
Burley	1,205	749	993	648
Kentucky-Tennessee	134	49	75	17
Maryland	8	3	-	-
Total	5,572	3,406	5,986	3,633

BRAZILIAN BAHIA CIGAR LEAF
 UP FROM EARLIER FORECAST

A substantial increase in output of Bahia cigar tobacco as compared to early season forecasts is reported from Brazil. The crop for harvest in the first half of 1955 was seriously affected by drouth and was estimated at 16.5 million pounds, but as a result of rains late in the growing season, production is now expected to reach almost 30 million pounds. This is an increase of 80 percent as compared to earlier estimates but is less than half the 1954 harvest of 64.7 million pounds.

The increase in Bahia cigar leaf raises the total Brazilian tobacco crop estimate for 1955 to 291 million pounds as compared to the earlier forecast of 277.8 million pounds. However, the latest estimate is still 5 million pounds below the 1954 crop officially placed at 296 million pounds.

The 1955 forecast for flue-cured tobacco remains at 61.7 million pounds, an increase of almost 10 percent, as compared to the 1954 crop. Burley tobacco for 1955 is forecast at almost 3.9 million pounds, 11 percent above last year's harvest, and production of other air-cured tobacco for cigarettes is expected to be more than 30 percent above last year when production reached 67.8 million pounds.

CHILEAN TOBACCO PRODUCTION
 ABOVE 1954 LEVEL

Tobacco production in Chile for harvest in the first half of 1955 is now forecast at about 14.2 million pounds, 16 percent above the final estimate of the 1954 harvest, according to a report just received from the American Embassy in Chile. The 1954 production totaled 12.2 million pounds, almost 1 million pounds less than the previous estimate for the crop. Acreage for harvest in 1955 is forecast at 7,670 acres-slightly below the area harvested in 1954. However, better yields per acre and therefore higher total production seem likely this season.

Flue-cured acreage is forecast at 7 percent below the 1954 figure but production is expected to be only slightly under the 677,000 pounds harvested last year. Burley acreage is expected to be more than $2\frac{1}{2}$ times as large, and production more than double the 1954 harvest, when 287,000 pounds were produced.

Dark air-cured Paraguayan tobacco used mostly for cigarette production is expected to total more than 10 million pounds in 1955, almost 27 percent above last year's output. Cigar tobacco acreage for harvest in 1955 is estimated to be 36 percent lower than in 1954 while production is forecast at 2.77 million pounds, about 15 percent below the previous crop.

CANADA EXTENDS BUTTER SUPPORT PRICE

The Canadian Ministry of Agriculture has announced that the current 58 cent support level (equivalent of 59 United States cents) would be continued until April 30, 1956. To support butter prices at this level the government will buy first grade butter tendered at Toronto, Montreal, Halifax and Saint John.

The move on the part of the government has set at rest the fears of many farmers and dairy organizations who thought that the butter surplus, currently estimated at two-thirds of the 60 million pound stocks, would result in a drop in the support price which would, in turn, effect all dairy products prices.

Canada has considered a number of proposals for cutting the price of butter, about 20 cents above the world market price, in order to stimulate both domestic and export demand. However, the only concession the government has made is to reduce the price to hospitals and other public institutions to 40 cents per pound. (Foreign Crops and Markets, February 7, 1955.)

U.S. RICE EXPORTS IN JANUARY

United States rice exports during January, 1955, with countries of destination and comparisons, are shown in the table of the following page:

RICE: United States exports to specified countries,
January 1955, with comparisons, 1/

Country of destination	August-July		August-January		January	
	1952-53	1953-54 2/	1953-54 2/	1954-55 2/	1954	1955 2/
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: bags	: bags	: bags	: bags	: bags	: bags
<u>Western Hemisphere:</u>	:	:	:	:	:	:
Canada	601:	633:	370:	382:	50:	109
British Honduras	3:	17:	3:	19:	0:	3
British West Indies	81:	6:	3:	1:	0:	0
Juba	4,876:	4,755:	3,506:	2,657:	427:	231
Haiti	2:	2:	1:	54:	0:	3/
Netherlands Antilles	41:	53:	24:	20:	4:	3
Venezuela	86:	215:	129:	58:	30:	26
Colombia	3/	314:	1:	182:	1:	9
Other countries	13:	32:	18:	16:	0:	1
Total	5,703:	6,027:	4,055:	3,389:	512:	382
<u>Europe:</u>	:	:	:	:	:	:
Belgium and Luxembourg....	52:	206:	143:	159:	5:	5
Greece	3/	11:	5:	5:	0:	0
Iceland	0:	0:	0:	16:	0:	0
Netherlands	0:	12:	11:	7:	4:	0
Sweden	3/	1:	0:	69:	0:	1
Switzerland	38:	57:	42:	49:	1:	2
West Germany	3/	29:	20:	9:	0:	0
Other countries	10:	24:	21:	6:	1:	0
Total	100:	340:	242:	320:	11:	8
<u>Asia:</u>	:	:	:	:	:	:
Saudi Arabia	138:	130:	65:	119:	4:	8
Ceylon	647:	0:	0:	0:	0:	0
Indonesia	1,100:	0:	0:	0:	0:	0
Philippines	3/	3/	3/	0:	3/	0
Korea, Republic of	4/ 4,631:	590:	590:	3/	0:	3/
Hong Kong	179:	0:	0:	3/	0:	3/
Japan	3,999:	8,538:	4,336:	393:	1,362:	1
Ryukyu Islands	616:	0:	0:	0:	0:	0
Other countries	5:	25:	17:	7:	0:	0
Total	11,315:	9,283:	5,608:	519:	1,366:	10
Total Oceania	19:	17:	11:	13:	1:	2
Liberia	22:	67:	0:	101:	0:	22
Other Africa	3/	6:	4:	5:	3:	0
Other	-:	5/ 8:	-:	5/ 5:	-:	5/ 1
Total world	17,159:	15,748:	9,320:	4,352:	1,893:	425

1/ Milled rice, including brown, broken, screenings and brewers' rice and rough rice converted to terms of milled at 65 percent. 2/ Preliminary. 3/ Less than 500 bags.

4/ Adjusted to include all programs of the Department of Defense and the Foreign Operations Administration. 5/ Starting with January 1954, "other" includes shipments valued at less than \$500 each when the number of such shipments to a country in a given month is few.

TURKISH COTTON EXPORTS
AT LOW RATE IN 1954-55

The continued low rate of Turkey's cotton exports during the first 6 months (August-January) of the 1954-55 marketing year resulted in exports of only 73,000 bales (500 pounds gross), a decline of 64 percent from exports of 203,000 bales during the first half of the previous year, according to Laurell L. Scranton, Agricultural Attaché, American Embassy, Ankara. Principal reductions were in exports to Japan, France, and Israel, but quantities to all areas except Western Germany were well below the previous year's figures.

TURKEY: Exports of cotton by countries of destination;
average 1933-37; annual 1951-53;
August-January 1953-54 and 1954-55

(Bales of 500 pounds gross)

Country of destination	Year beginning August 1				August-January	
	Average	1951	1952	1953	1953-54	1954-55
	1933-37					
	1,000	1,000	1,000	1,000	1,000	1,000
	bales	bales	bales	bales	bales	bales
Austria	0	2	7	1/	1/	4
Czechoslovakia	1	21	25	27	10	7
Finland	0	0	8	15	6	1
France	1/	61	74	41	26	2
Germany	43	131	116	26	15	21
Hungary	0	16	31	19	11	4
Israel	0	2/	4	25	17	2
Italy	11	9	122	53	15	6
Japan	9	1	0	52	39	0
Netherlands	0	1	7	2/	0	1/
Poland	2	2	7	31	13	2
Sweden	0	0	4	0	0	0
United Kingdom	1/	9	3	2	2	0
Yugoslavia	0	2/	18	57	31	8
Other countries	3	8	7	25	18	16
Total	69	261	433	373	203	73

1/ Less than 500 bales. 2/ If any, included in "Other countries".

Compiled from Statistique Mensuelle du Commerce Exterieur and official reports.

Government restrictions on exports to countries (mostly Communist) which are not members of the European Payments Union (EPU) and high prices based on those received for cotton exported to these countries were reported to be the principal causes of the reduced exports to regular markets. The government's action in September 1954 to alleviate its trade deficit position with European creditors restricted exports to non-EPU countries in an effort to encourage exports to creditor countries.

The expected increases did not materialize. Prices receded somewhat until mid-November 1954, when they started a continuing upward trend, reaching approximately 49 U.S. cents a pound for Acala I by late March 1955. The price of Acala I (roughly equivalent to Middling 1-1/16 inch) on the Izmir Exchange on March 24, 1955, was TL3.0 per kilogram (48.76 U.S. cents per pound), as compared with TL2.39 per kilogram (38.72 U.S. cents per pound) on November 18, 1954.

A recent trade agreement with France for 138,000 bales of cotton is expected to increase exports in February and March. Agreements with other countries are reportedly under negotiation. Foreign buyers apparently are willing to pay prices for Turkish cotton as much as 15 to 20 percent above the world market if they receive higher prices for their exchange goods or if debit arrearages can be cleared up by the purchase of cotton. The total exportable surplus for 1954-55 is estimated at 300,000 to 320,000 bales.

Cotton production in Turkey for August-July 1954-55 is estimated at 650,000 bales as compared with 638,000 bales in 1953-54, and 690,000 in 1952-53. Domestic consumption of cotton appears to be on a decided up-trend with further increases for 1955 and 1956 anticipated as additional plants are brought into operation. The output of cotton yarn by State-owned spinning mills in the calendar year 1954 was estimated at about 15 percent above that in 1953. Production by privately owned plants was expected to show a similar increase, and prospects for the August-July 1954-55 year indicate that domestic cotton consumption for all purposes may exceed 300,000 bales or nearly half of total production.

Turkey's cotton stocks on August 1, 1954, were estimated at 100,000 bales, as compared with 160,000 held a year earlier. Incomplete information available by the end of February 1955 indicated that unsold stocks were approximately 150,000 bales, although a firm estimate was not possible because of pending negotiations.

MEXICAN 1955-56 COTTON CROP EXPECTED TO SET NEW RECORD

Mexico's 1955-56 cotton crop is expected to set a new record and may reach 2 million bales (500 pounds gross) according to Paul G. Minneman, Agricultural Counselor, American Embassy, Mexico City. Good rains in the fall raised the water level of most irrigation dams, and considerably more newly irrigated areas will be available for the first time. Approximately 140,000 acres will be added in the Matamoros region from the Falcon Dam, and about 130,000 acres in the Yaqui Valley from irrigation wells. Total area planted to cotton for the 1955-56 crop is forecast at 2.3 million acres as compared with 1,830,000 acres harvested in 1954-55.

The 1954-55 crop amounted to about, 1,780,000 bales or 47 percent more than the 1953-54 crop of 1,210,000 bales, and 42 percent more than the 1952-53 crop of 1,250,000 bales. A smaller area was planted to cotton in 1954 than in the two previous years, but increased irrigation facilities, unusually favorable weather, increased use of fertilizer and light insect infestation resulted in an average yield of about 461 pounds per acre as compared with 302 pounds in 1953-54.

Exports from the 1954-55 crop are expected to reach 1,340,000 bales, and about 80 percent of this had been exported by March 1. Exports during the first 6 months (August-January) 1954-55 amounted to 885,000 bales or 32 percent more than exports of 672,000 bales in the corresponding period of 1953-54. More than half of Mexico's cotton exports move by transshipment through United States' ports, and therefore show on the following table as exports to the United States.

The amount of Mexican cotton that can enter the United States for consumption is limited by import quota to 18,500 bales (under 1-1/8 inches in staple length) annually. Mexico does not produce the type of long staple cotton normally imported into the United States under a global quota which is not divided by countries of origin.

MEXICO: Direct exports of cotton by countries of destination, annual 1951-53; August-January 1953-54 and 1954-55

Country of destination	(Bales of 500 pounds gross)					
	Year beginning August 1			August-January		
	1951	1952	1953	1953-54	1954-55	
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: bales	: bales	: bales	: bales	: bales	: bales
Belgium	5	5	14	12	15	
Canada	6	3	1/	1/	1/	
France	123	1	2	2	2	
Germany	7	6	24	19	13	
Japan	25	184	330	264	157	
Netherlands	1	4	43	37	15	
Spain	2/	6	16	8	3	
United Kingdom	2/	9	22	19	9	
United States 3/	778	741	483	295	664	
Other countries	27	33	17	16	7	
Total	972	992	951	672	885	

1/ Less than 500 bales. 2/ If any, included in "Other countries".

3/ Mostly for transshipment to other countries. Under the United States import quota only 18,500 bales (under 1-1/8 inch staple length) can enter annually for consumption.

Source: Revista de Estadística; reports from Agricultural Attaches and other U. S. representatives abroad.

Data available on transshipments from Mexico cannot be directly related to the exports shown above, because they include linters and waste, and exclude rail shipments to Canada. Transshipments for August-December 1954 amounted to 501,000 bales, to the following destinations: Japan 23 percent; Western Germany 18 percent; Belgium 16 percent; the United Kingdom 14 percent; the Netherlands 14 percent; and Sweden and Switzerland each 3 percent.

Domestic consumption by mills is increasing, due to greater domestic textile sales, and also to some increase in textile exports. The forecast of consumption for the current marketing year is expected to reach 380,000 bales as compared with consumption of 330,000 bales in 1953-54. Only insignificant quantities of baled cotton are used for non-mill purposes.

Mexico's cotton stocks on July 31, 1954, were estimated at 80,000 bales, down 27 percent from stocks of 110,000 bales held a year earlier.

SPANISH COTTON CONSUMPTION AT LAST YEAR'S LEVEL BUT IMPORTS DECLINE

Spain's cotton mill consumption during the first 7 months (August-February) of the 1954-55 marketing year amounted to 196,000 bales (500 pounds gross) or approximately the same as consumption during the corresponding period of the previous year, according to H. R. Zerbel, American Vice Consul, American Consulate General, Barcelona.

Imports during the current period have declined, however, dropping from 195,000 bales in August-February 1953-54 to 144,000 bales in August-February 1954-55. Imports from the United States dropped from 111,000 bales in the 1953-54 period to 62,000 in August-February 1954-55.

Increased domestic production of cotton has partially offset the decline in imports. Production in 1954-55 is estimated at 80,000 bales, as compared with 75,000 in 1953-54, and 65,000 in 1952-53. During the 5 years 1945-49 cotton production in Spain averaged 18,000 bales.

Spain's cotton stocks on February 28, 1955, were estimated at 120,000 bales or an approximate 4-month supply based on the rate of consumption during the August-February period of the current year. Supplies on August 1, 1954, were estimated at 109,000 bales, as compared with stocks of only 38,000 held a year earlier. Spain's goal is to maintain 6 or 7 months working stocks and they are working toward that end. New storage space, partially financed by government earnings from the cotton program, is being built at the port of Barcelona.

BARI ALMOND AREA HIT BY FROST

Preliminary reports received from southern Italy state that frost in mid-March has caused damage to the almond groves in the Bari area. This area normally accounts for over 60 percent of the commercial Italian almond crop. Blossoming had been very early this year under predominantly favorable conditions, and prospects prior to the frost were for a large crop. Extent of the frost damage is difficult to evaluate at this stage. More specific information as to degree of damage will be available later.

FRANCE EXPECTS ABOVE-AVERAGE
OLIVE OIL OUTPUT

France's 1954 crop of olives may have produced 7,700 short tons of edible olive oil and 1,100 tons of inedible oil, reports T. C. Stave, American Consulate General, Marseille. Although less than the 11,000 tons produced from the 1953 crop, this total volume of 8,800 tons is greater than average for an "off" year. Production east of the Rhone fell to one-third of normal, but this decline was offset partially in the department west of the Rhone where olive trees produced excellent crops. In the Gard Department, olive oil production was 4 times that of 1953.

On the whole the quality of the oil is considered to have been good as there was almost no insect damage.

Consumption of olive oil in 1954 is estimated at 19,800 to 22,000 tons, plus a few tons of low-quality oil used in salad oil. This salad oil is basically rapeseed oil, mixed sometimes with peanut oil, soybean oil and olive oil, depending upon the season and prices.

The increase from the 16,500 tons consumed in both 1952 and 1953 is due partially to lower prices and partially to the olive oil publicity campaign for which 18 million francs (over US \$51,000) was spent in 1954. Some 25 million francs (over US \$71,000) is allocated for publicity in 1955.

Consumption of olive oil in France is small compared with peanut oil (176,000 short tons) and salad oil (77,000 tons). Consumption of all 3 oils has decreased considerably since before the war, partly due to wartime-developed habits, but mainly because of an increase in production and consumption of milk products and margarine. Margarine consumption alone has doubled since 1938. French consumption of all vegetable fats, at 6 kilograms (13 pounds) per capita, is second only to that of the United States.

French foreign trade in olive oil increased considerably during 1954, with imports mounting from 21,402 tons in 1953 to 40,181 tons and exports from 9,173 to 11,315 tons. The bulk of the imports came from Tunisia. The largest tonnage sent to one country went to Brazil and the second largest to the United States.

Prices were generally lower in 1954 and fluctuated more than in 1953 due mainly to market conditions in Tunisia, France's principal source of supply. Tunisian oil was quoted c.a.f. Marseille on February 25 as follows:

	<u>Francs per kilo</u>	<u>U. S. cents per pound</u>
Extras	198/200	25.7/25.9
Fine courante	189/196	24.5/25.4
Lampantes	181/183	23.5/23.7

As reported previously, olive oil interests had been seeking ways to eliminate price fluctuations characteristic of the olive oil market, and had been attempting to get the Government to include olive oil in the price guarantee regulations in effect for other fats and oils. A Government decree of November 13, 1954, finally included olive oil in such price guarantees.

The decree, in addition to renewing the guarantees for peanut and rapeseed oils, accords an annual minimum price guarantee to French and North African olive oil production up to a limit of 97,500 tons, on the basis of a parity between inedible olive oil and peanut oil.

According to a report of the Economic Council of the French Government, the purposes of the November 13 decree are: (1) to assure the development of over-all production of oleaginous products, in order to eliminate imports and to stimulate exports; (2) to assure French and colonial industries a regular supply at a ceiling price, and give them protection against excessive market variations; and (3) to ensure that producers will be able to dispose of their products at a minimum price, in case of surplus harvests.

Although producers and growers are generally in favor of the decree, commercial interests are already criticizing it, stating that it was enacted for political reasons to appease Tunisian olive oil producers and that it could have serious economic effects.

ALGERIAN OLIVE OIL PRODUCTION ABOVE AVERAGE

Algerian olive oil production for the crop year 1954-55 is estimated at 30,000 to 33,000 short tons, well above the "normal" production of approximately 28,000 to 29,000 tons of the previous 2 years, according to C. G. Dunham, American Consulate General, Algiers. The above-average production is attributed to excellent weather.

The exportable surplus of Algerian olive oil will amount to an estimated 11,000 to 13,000 tons or slightly over one-third of total production. Trade sources state that a 10 percent ad valorem bounty granted by the French Government on exports to non-French territories will significantly assist Algerian producers compete on the world market. They point out, however, that Algerian olive oil competes not only with the olive oil of other countries, but also with peanut and other vegetable oils. Most Algerian olive oil which is exported is shipped to France where substantial quantities are mixed in varying proportions with peanut, cottonseed and soybean oils, to produce salad oil. The proportions of the various oils depend upon seasonal and annual price fluctuations--the lower-cost oils being used in greater quantity. Consequently, future exports of olive oil depend on a number of factors which are difficult to predict.

Consumption of olive oil in calendar 1954 is estimated at 24,500 tons. As in France, olive oil in Algeria is mixed with other vegetable oils to produce salad oils of varying composition.

Although total Algerian exports of olive oil declined from 23,084 tons in 1953 to 6,025 tons in 1954, and although exports to the United States declined from 3,554 tons in 1953 to 1,858 tons in 1954, the United States was second only to France as a market.

Stocks of olive oil in Algeria as of March 1, 1955, were estimated by trade sources at approximately 19,000 to 22,000 tons.

Algerian lampante grade olive oil of 5 to 8 percent acidity sold for 155 francs per kilo (20.1 cents per pound) in January 1954, f.o.b. refinery, declined to a low of 153 francs (19.8 cents) in February, climbed to a high of 178 francs (23.1 cents) in October, and closed the year at 160 francs (20.7 cents). Finer grades of oil reflected the fluctuations of lampante at a level from 20 to 25 francs (2.6 to 3.2 cents) higher. About 70 percent of all Algerian oil marketed in calendar 1954 was of lampante grade while the remaining 30 percent consisted of finer grades.

FRENCH MOROCCO'S OLIVE OIL PRODUCTION UP SHARPLY

Olive oil production from French Morocco's 1954 crop of olives is estimated officially at 27,560 short tons, report W. N. Stokes and A. S. Junod, American Consulate General, Rabat. This is in sharp contrast to the 18,000 tons of oil obtained from the 1953 crop.

Local consumption of olive oil is expected to increase in 1955 to an estimated 24,250 tons as a consequence both of the large olive crop and the boycott of imported peanut oil.

The supply and distribution of olive oil from the olive crops of the last 2 years is as follows (in short tons):

	<u>1954</u>	<u>1955</u>
<u>Supply</u>		
Stocks carried in 1/	1,100	1,100
Production 1/	17,640	27,560
Imports 2/	2,370	-
Total supply	21,110	28,660
<u>Disposition</u>		
Consumption	19,880	1/ 24,250
Exports	2/ 130	3,310
Stocks carried out	1/1,100	1,100
Total distribution	21,100	28,660

1/ Unpublished Residency data. 2/ Official customs data.

Exports of olive oil during 1954 amounted to only about 130 tons, virtually all sent to Brazil. According to the trade press, the Protectorate's Government will endeavor to resume the previous "Riviera oil" exports to the United States, which had reached nearly 5,500 tons in 1948 and were suddenly stopped by a price fall on the American market.

Olive oil quotations on the Casablanca wholesale market on February 5, 1955, were as follows: Raw olive oil, 180-190 francs per kilo (23.3-24.6 cents per pound) and refined olive oil, 240 francs per liter (34.2 cents per pound).

French Morocco's oilseed production in 1954 is reported officially as follows: Flaxseed--1,237,725 bushels; sunflower seed--1,290 short tons; sesame seed--440 tons; and cottonseed--330 tons.

In a letter published in the Bulletin de la Chambre Francaise d'Agriculture de Rabat, January 1955, the Protectorate's Agricultural Services formally advised flaxseed growers that the following measures were planned by the French Government concerning the minimum purchase price guaranteed to producers:

"The guaranteed price per kilo ex wholesale warehouse would be 58 francs (\$4.21 per bushel), instead of the present 63 francs (\$4.57). Moreover, one franc per kilo (7.3 cents per bushel) would be deducted from this price, in order to supply a productivity fund. The money from this fund would be transferred to Morocco, which would distribute it to the growers, in agreement with the Metropole, as an incentive for production.

"The price guarantee would be limited to 40,000 metric tons, including 14,000 tons from Metropolitan France, and 26,000 tons from North Africa. For the 1954 crop the quantity guaranteed to North Africa had been 33,000 tons.

"Up to now, the price refund had been applied to the whole Moroccan production, even to flaxseed used for Morocco's domestic consumption. Henceforward, it would be restricted to flaxseed destined for the French market. In fact, the French authorities observed, there are no c.i.f. charges on flaxseed destined for the Moroccan market, and the charges from warehouse to local factory are not higher than those from c.i.f. to Metropolitan factory."

The wholesale prices of flaxseed and raw linseed oil on the Casablanca market on January 5 were, respectively, 75 francs per kilo (\$5.44 per bushel) and 120-125 francs per kilo (15.6-16.2 cents per pound).

CANADIAN FLAXSEED PLANTINGS SEEN UP SHARPLY; SOYBEANS DOWN

Canadian farmers plan a substantial increase from 1954 in the acreage seeded to flaxseed, but a decrease in the soybean acreage, on the basis of their intentions as of March 1, reports the Dominion Bureau of Statistics. Intended flaxseed plantings are placed at 1,665,000 acres or 38 percent more than the 1,206,000 acres planted in 1954, double the 5-year average of 828,000 acres and the largest planting since 1948. Prospective increases in all flax-growing provinces except Ontario range from 10 percent in British Columbia to 64 percent in Saskatchewan. A 5-percent decrease is indicated in Ontario.

Soybean intentions in Ontario, the only province growing this crop on a commercial scale, are placed at 242,000 acres, a decrease of about 5 percent from last year's 254,000 acres. If this decrease materializes, it will be the first time since 1944 that soybean acreage in the province has failed to register an increase.

AUSTRALIA'S WHALE QUOTA REDUCED

The quota of humpback whales allocated to Australian whaling stations has been reduced from 2,040 whales in 1954 to 1,840 whales in 1955, reports H. J. Mullin, Vice Consul, American Embassy, Canberra. The reduction of 200 has been effected by reducing the quotas of the two largest stations in Western Australia by 100 each. The quotas for the 3 West Coast stations for 1955 are 500, 500, and 120, while the quotas for the 2 East Coast stations remain at 600 and 120 whales.

Whale stocks on the West Coast of Australia are showing unmistakable signs of depletion. This has been announced by the Minister for Commerce and Agriculture who said this conclusion had been reached following close study by the Fisheries Division of the Commonwealth Scientific Industrial Research Organization and the Department of Commerce and Agriculture of biological and scientific data collected over a number of whaling seasons.

According to the survey by the CSIRO and the Department of Commerce, East Coast stocks are just about constant. They are, however, being closely watched, and the quotas will be subject to annual review.

Production of whale oil by 3 of the 5 shore-stations operating in Australia in 1954 amounted to some 12,000 short tons. Total production of whale oil by 4 stations in 1953 was 19,100 tons and in 1952 around 17,000 tons.

INDIA'S PEANUTS, SESAME UP IN 1954-55

India's final official estimate of the 1954-55 peanut crop placed production at 4,282,000 short tons, unshelled, an increase of 7 percent from the revised 1953-54 estimate of 4,002,000 tons, reports the American Embassy, New Delhi. The increase in acreage was even more pronounced--12,647,000 acres in 1954-55 against 10,869,000 acres in 1953-54.

The increase in both acreage and production of peanuts during 1954-55 was largely in the states of Hyderabad and Saurashtra and to a lesser extent in Madras, Madhya Bharat and Uttar Pradesh. Better seasonal growing conditions during the year was the principal reason given for the larger output.

Sesame seed production in India also was reported to be up. At the "third estimate" stage, the 1954-55 crop was estimated at 635,000 tons from 5,861,000 acres against corresponding 1953-54 estimates of 598,000 tons from 6,079,000 acres.

Despite a decrease in acreage, sesame production increased due to better climatic conditions during the growing period. The increase in production has been shared mainly by Uttar Pradesh and Madhya Bharat. Past experience has shown that the area at the third estimate stage forms roughly 95 percent of the crop finally reported.

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PUBLICATIONS RELATING TO U.S. FOREIGN AGRICULTURAL TRADE

(Continued from Page 373)

Honduran Coffee Situation. Foreign Agriculture Circular FCOF 3-55.

World Rice Production at Near-Record Level. Foreign Agriculture Circular FR 3-55.

Mexico: Poultry and Egg Situation. Foreign Agriculture Circular FPE-3-55.

Livestock Developments in Latin America. Foreign Agriculture Circular FLM 2-55.

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L A T E N E W S

The Citrus Fruit Board of the Union of South Africa estimates 1955-56 citrus production at 9.3 million boxes, compared with 8.8 million boxes last year. Exports may range between 6.5 and 6.8 million cases, compared with 6.4 million last season. Unusual rainy weather may delay harvest, with little packing before early May.

A sizable reduction in Uganda's 1954-55 cotton crop to approximately 267,000 bales (500 pounds gross) is expected to result from unusually heavy rains in late January which damaged the maturing crop. Earlier estimates had placed this year's crop at 321,000 bales. Production in 1953-54 amounted to 330,000 bales.

Late crop reports indicate that the 1954-55 cotton crop in the Anglo-Egyptian Sudan will total about 416,000 bales from an area of approximately 689,000 acres. This level of production represents a decrease from the earlier estimates, but it is still considerably larger than the 400,000-bale crop harvested from 652,000 acres in 1953-54.

Cotton production in Burma for the crop year 1953-54 amounted to approximately 95,000 bales (500 pounds gross). By March 1954 the crop had all been sold through use of a system of weekly and fortnightly tenders. The bulk of Burma's crop was exported to Japan, but the United Kingdom and several continental European countries also entered the market. The quality of the cotton was well maintained, and claims for deficiencies from foreign destinations were comparatively few. Certain adverse arbitration awards in Liverpool, however, served to emphasize the importance of establishing "types" for Burmese cotton.

United States imports of cotton (for consumption) in January, 1955, amounted to 16,000 bales (480 pounds net) including 5,000 bales each from Egypt and Mexico; 2,000 bales each from India and Peru; and 1,000 bales from Pakistan.

Imports of cotton linters into the United States in January, 1955, amounted to 15,000 bales (480 pounds net). The U.S.S.R. supplied 6,000 bales; Mexico 5,000; Brazil 2,000; and El Salvador 1,000.

Exports of cotton linters from the United States during January, 1955, totalled 28,000 bales (480 pounds net) compared with 25,000 bales in January, 1954. The exports in January, 1955, show Germany receiving 14,000 bales; the United Kingdom 7,000; Canada 3,000; and France 2,000.

